Equitable Advisors: Model Portfolio offering

July 21. 2021

Powered by BL|Financial

Prepared for All PwC Employees & Partners/Principals

BL|Financial

The company

The Financial Advisors of BL Financial Group, have extensive experience working with PwC Employees, Partners and Managing Directors over the years. We offer risk-appropriate investment strategies with one-on-one guidance to help you pursue you financial goals while helping you comply with PwC independence requirements.

Independence compliance is ultimately the responsibility of the PwC participants. However, we coordinate with you in the clearance of securities for each of the model portfolio's we offer, coupled with participation in PwC's Brokerage Simplification Program, we can assist PwC Individuals in "pre-clearing" securities through checkpoint.

The portfolios offered are designed to be cost-effective, simple to use and exclusively priced for PwC.

We are able to bring this overall program together by:

- Leveraging the insights, efforts and vast resources of LPL Financial .
- Plug and Play models, investment strategies and portfolios based on our professional perspective and a range of investment objectives and risk profiles designed for your situation.
- Offering dynamic and diversified exposure to select market segments, designed to give you the opportunity to fulfill a wide spectrum of strategies.
- Employing thoughtful, experience-based and tactical asset allocation that we believe can help your investments be resistant to market volatility.

In addition, we can design an overall portfolio to complement your investments in the Model portfolio offering to create a customize strategy tailored to your needs and goals. Further, after you retire, we can provide you with investment strategies designed to help generate income, track your spending and provide you with confidence that you have planned appropriately to not outlive your resources.

Background

Our Mission

Our mission is simple: to provide forward-thinking and cost-effective financial strategies to our valued clients. The keys to our firm's success are our professional excellence and integrity, our constant pursuit of open communication and an in-depth understanding of each of our client's unique financial needs. Our associates' credentials, experience and principled approach allow us to deliver on our promise of personalized service and provide an added level of confidence to our clients.

Our Team

Scott Budriss
Founder of BL Financial

Ryan Reeves
Senior Associate

Kyle Lucas
Founder of BL Financial

Kali Smith
Administrative Assistant

The Power of Experience

Prepared for All PwC
Employees &
Partners/Principals

Model Portfolio Offering

Tier 1 Offering:

Our goal was to create a simple, systematic way for PwC individuals to save, while enjoying professional management on a reduced fee structure. To put this in perspective someone not part of this discounted program could be charged up to 1.5%.

Due to our investment approach and our ability to work with "pre-cleared" investment firms, we are able to select world class investment managers with long standing successful history of managing assets

BL Management Fee at 0.55%

Model Options:

- Conservative (20/80)
- Conservative Plus (30/70)
- Moderate (60/40)
- Moderate Plus (70/30)
- Aggressive (80/20)

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Model Portfolio Offering

Tier 2 Offering:

Tier 2 – Our comprehensive planning option. Includes custom models with the most extensive list of funds, proprietary asset mapping, insurance planning. Full service from our team of Financial Advisors, quarterly reviews, and more.

BL Management Fee at 1.00%

Custom Model Options:

- Cash Alternative
- Conservative
- Conservative Plus
- Moderate
- Moderate Plus
- Aggressive
- Aggressive Plus
- Stock Sleeve
- Alternative strategies

Do you think our services align with your goals but doesn't quite fit your needs? Contact us below and we can walk through more options with you.

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How to start the process

Let's set up a brief consultation:

Please email or call Ryan Reeves who will be your dedicated contact and lead coordinator.

- Ryan.reeves@equitable.com
- (610-660-4116)

Additionally you can click on the link below to simply schedule meeting with us.

Our Calendar

Disclosure:

Total account fee may be higher or lower than those listed, based on fund allocation, investment platform fees & expenses. Please refer to account agreement for additional details. The purchase of insurance products would be subject to additional costs, including commissions. Asset Allocation is a method of diversification which positions assets among major investment categories. This tool may be used in an effort to manage risk and enhance returns. However, it does not guarantee a profit or protect against a loss. Investments are subject to fluctuation in value and market risk, including loss of principal.

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